Session 3: Module 5 - Scan Documents Part 2

FINAL

Description	Text
1. Introduction	Welcome to Session 3 Module 5 of the M-SPIRIT Required Online Training presented by the Montana Department of Public Health and Human Services WIC Program.
2. Start	Document Imaging Part 2
3. <scan1>	We finished the last module while in Little Duckling's folder.
	Let's take a look at reassigning and deleting scanned documents while in Little Duckling's folder.
	Click on Little Duckling to highlight.
4. <scan2>	Open his folder by either double-clicking on his name or clicking the Open Participant Folder icon.
5. <scan3>	Do you remember how to view scanned documents?
6. <scan4>	<no script>
7. <scan5>	<no script>
8. <scan6>	Easy-peasy, right?
9. Scan1	If you accidentally scan a document into the incorrect participant folder you are able to simultaneously remove it and save it to the correct participant by clicking the Reassign Documents button.
	You can only reassign one document to one participant at a time.
10. <scan7>	Let's reassign "Scan Test Page" to another participant.
	Since it's already selected or highlighted in the grid, we can click the Reassign Document(s) button.
11. <scan8>	We can reassign the document to any participant in our clinic.
	If you were to try to reassign a document to a participant not currently assigned to the clinic you are working in, you will get a message indicating this...
12. Scan1_A	<no script>
13. <scan9>	We are going to reassign this document to Little Duckling's brother, Yellow Duckling. But first we need his State WIC ID to reassign the scanned document to him.
	Yellow's State WIC ID is: 583332. Enter his ID and click the OK button.

14. <scan10>	A confirmation message displays indicating the scanned document has been reassigned.
	When you click the OK button the scanned document will be saved to the specified participant folder and deleted from ALL of the original household's participant folders.
	Click OK on the message.
15. <scan11>	Since there aren't any scans left in this Participant Folder, as soon as you click OK on the confirmation message the View Scanned Documents window closes.
	Let's verify the scanned documents really have been reassigned.
	Click the Document Imaging menu again.
16. <scan12>	Select View Scanned Documents.
17. <scan13>	The message indicates that there aren't any scanned documents.
	Click OK.
18. <scan14>	Go ahead and close Little Duckling's folder by clicking on the Close Participant Folder icon.
19. Remember	Remember, when you reassign scanned documents they are deleted from all household member's folders.
20. <scan15>	We are going to take a look at the last function available for scanned documents…Delete Documents.
	Click on Yellow Duckling.
21. <scan16>	Open the View Scanned Documents window.
22. <scan17>	<no script>
23. <scan18>	<no script>
24. <scan19>	To delete a scanned document without reassigning it to another participant, simply select the document in the grid and click the Delete Document(s) button.
	If the scanned document was saved to multiple household members, the Delete button will remove the document from ALL of the household records.
	Since "Scan Test Page" is already highlighted in the grid, we can click the Delete Document(s) button.
25. <scan20>	Click OK on the confirmation message to complete the deletion process.
26. <scan21>	As we saw when reassigning documents, as soon as there aren't any documents to display, the View Scanned Document window automatically closes.
27. Questions	Do you have any questions about what we just reviewed? If so, please submit them via the M-SPIRIT Frequently Asked Questions forum on the Montana WIC website.